

TAB

9 July 1954

OFFICE OF PERSONNEL MEMORANDUM NO. 40-150-5

SUBJECT: Forms Management

RESCISSIONS: a. OPM No. 40-150-2 (47-53), Personnel Office Forms Management Program
b. OPM No. 45-250-2 (71-53), Centralization of the Storage and Disbursement of Personnel Forms
c. OPM No. 40-150-3 (75-53), Officials Authorized to Sign Reproduction Requisitions for the Personnel Office

I. GENERAL

a. This memorandum establishes responsibilities and procedures for implementation of the Agency's Forms Management Program within the Office of Personnel. Form materials serve as devices for carrying out administrative activities, gathering and recording information, ensuring control over the routing of actions and administrative data, furnishing a means for standardizing procedures and processing channels, and ensuring compliance with applicable legal and regulatory requirements. The purposes of forms management include the following:

- (1) To insure the need for existing and proposed form materials;
- (2) To simplify, standardize, and graphically improve form materials through application of modern form design standards;
- (3) To provide for reproduction, supply and distribution of form materials as efficiently and economically as possible;
- (4) To ensure that procedural instructions required in the preparation of form materials are clearly expressed and provide for efficiency of operations;
- (5) To reduce the number of form materials to a minimum by consolidating those serving like functions and by eliminating obsolete and ineffective form materials; and
- (6) To provide a central information and control point for form materials.

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b. The term "forms" includes printed or reproduced documents (including agreements) that contain blank spaces for inserting specific information. The term "form letters" includes letters which are printed or reproduced in order to furnish information for a large mailing or for repeated mailings. As used herein, the term "form materials" includes all numbered and unnumbered forms, form letters, instruction sheets, informational notices, and guide sheets which are printed or reproduced. Generally, the term "form materials" does not include materials reproduced by photographic methods (photostats, ozalid prints, microfilm, autostat, etc.) and materials of a directive or regulatory nature.

2. RESPONSIBILITIES

a. Chiefs of Staffs and Divisions of the Office of Personnel are responsible for ensuring that form materials developed or used within their respective jurisdictions are necessary and properly used.

The Executive Officer
b. ~~The Chief of Staff and Division of the Office of Personnel (PAS)~~, has general responsibility for forms management within the Office of Personnel. He will provide for the development, design, review, coordination and reproduction of form materials to achieve the purposes stated in paragraph 1a above. He will also conduct such surveys and maintain such controls and records as he determines are necessary.

3. DEVELOPMENT OF NEW OR REVISED FORM MATERIALS

Executive Officer
a. ~~The Chief of Staff~~ PAS, and Chiefs of other Staffs and Divisions are jointly responsible for continuous review of form materials used in the Office of Personnel and for initiating appropriate action to reduce, simplify, standardize and improve such materials.

b. PAS will maintain a central inventory of all forms, current and obsolete, approved for use within the Office of Personnel. This inventory will also include forms containing personnel data used outside the Office of Personnel which come to the attention of the PAS.

c. The need for new or revised form materials will be considered in the development or evaluation of procedures to insure the most effective use of form materials.

d. Requests for approval of new or revised form materials will be initiated on Form 30-11, Request for the Approval of Forms, prepared in duplicate and signed by the Chief of the Staff or Division concerned. A legible draft of the proposed form material and a copy of any applicable written procedure will be attached to Form No. 30-11. (When necessary, procedural instructions will be developed to accompany the request.) Any additional information which will aid in the construction of the final design of the form or provide more explicit data relating to issuance of directives and instructions pertaining to use of the proposed form should also be included. (See Attachment 1 for detailed instructions concerning Form 30-11.)

COORDINATION AND APPROVAL OF NEW OR REVISED FORM MATERIAL

The Executive Officer

a. ~~He~~ will review proposed form material in relation to the purposes stated in paragraph 1a above and will collaborate with the originating and coordinating elements in making any changes required in proposed drafts to accomplish these purposes. If any issue cannot be resolved in this process, the matter will be referred to the Office of the Assistant Director for Personnel for decision.

The Executive Officer

b. ~~He~~ will serve as the liaison and contact point between the Office of Personnel and the Management Staff, Office of the Comptroller, and the Printing and Reproduction Division, Logistics Office, on all matters concerning the processing, approval and reproduction of form materials.

5. REPRODUCTION

a. Form 36-2, Reproduction Requisition, for a new or revised form ~~or for reprinting of an existing form~~ will normally be signed by the *The Executive Officer*. However, when significant program changes are involved, Form 36-2 will require the signature of the Assistant Director for Personnel, his Deputy, or the OP Executive Officer. Form 36-2 for non-form material will be signed by the chief of the Staff or Division concerned. However, initial requests for reproduction of over-printed forms, instruction manuals, and other such material will require prior clearance with ~~the~~ *The Executive Officer*. (See Attachment 2 for detailed instructions concerning Form 36-2.)

b. Form 36-2 for reprinting previously approved form material will be accompanied by a memorandum stating any changes in the number of copies used per month, requirements for a different type of paper, etc.

The Executive Officer

c. ~~He~~ will maintain a central job number registry for reproduction requisitions in accordance with Agency ~~and~~ and will be responsible for transmitting material to the Management Staff or the Printing and Reproduction Division, as appropriate. Requisitions and attached material forwarded to ~~the~~ *The Executive Officer* for assignment of job numbers only will be dispatched to the Printing and Reproduction Division immediately after registry.

6. STOCKING OF FORM MATERIALS


a. Each Staff and Division is responsible for ensuring that necessary supplies of form materials are adequately and securely maintained within their organization.

b. Supplies of form materials approved as stock items will be obtained through the Building Supply Officer.

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Executive Officer
c. Supplies of non-stock form materials will be maintained in a central storage room supervised by ~~the Executive Officer~~ except as approved by the Chief, Divisions and Staffs will not maintain such materials in excess of one month's requirements. Form materials stored in the central storage room may be obtained from the Building Supply Office during regular supply room hours or, in emergency cases, from ~~the Executive Officer~~.

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George E. Nelson
Deputy Assistant Director
for Personnel

Attachments

- 4 -

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